

STATE CONTROLLER'S OFFICE
PERSONNEL/PAYROLL SERVICES DIVISION
P.O. Box 942850
Sacramento, CA 94250-5878

DATE: May 7, 2003

PERSONNEL LETTER # 03-006
CIVIL SERVICE ONLY

TO: All Agencies in the Uniform State Payroll System

FROM: JOHN R. HARRIGAN, Chief
Personnel/Payroll Services Division

RE: STATEWIDE TRAINING CATALOG FOR THE FALL 2003 SEMESTER

This memo provides the latest information regarding the State Controller's Office, Personnel/Payroll Services Division's statewide training classes for September through December 2003.

Please note the following change to the training enrollment requirements.

Previously and in response to the difficulty departments were experiencing in scheduling training for new Personnel Specialists, we requested that only new Personnel Specialists who met class prerequisites be enrolled in training, followed by those Personnel Specialists who had not had training for a given class within the past "two" years. Based on your comments and suggestions, we are reducing the "two" years requirement to "one" year.

Our focus on enrollment will still be new Personnel Specialists who meet class prerequisites, followed by those Personnel Specialists who have not had training for a given class within the past "one" year. We are aware that special circumstances may exist that necessitate enrollment for Personnel Specialists who do not meet these requirements, and we will work with you to accommodate your needs.

TRAINING ENROLLMENT

On Friday, May 16, 2003 a Needs Assessment form will be sent to all agencies via electronic mail. In order to create an equitable process for all agencies when responding to the Needs Assessment, we request that the agency Training Coordinator complete the form and return it no earlier than 8:00 AM on Wednesday, May 21, 2003 and no later than the close of business on Thursday, May 29, 2003. Please return the form to the Training Administrator at jcollins@sco.ca.gov, or via FAX at (916) 324-7293. Please note that no phone calls will be accepted in lieu of this procedure.

By Wednesday, June 25, 2003 the Fall 2003 Training Schedule will be published via electronic mail. On Tuesday, July 8, 2003 the Training Administrator will begin contacting each agency's Training Coordinator in the order that the Needs Assessments were received.

When selecting a location for training, please indicate the nearest city for which you know your department will provide travel funds and which you are sure your Personnel Specialists will be able to attend. If there are no cities that meet these criteria, refer to the "CONSULTATIONS/SPECIAL REQUESTS" section of this letter. Our training sites are ADA accessible.

We will make every effort to place Personnel Specialists who meet the enrollment requirements (see above), into the programs and dates requested. However, if placement is not possible at that time, the Training Administrator will offer other alternatives, dates, or suggest a direct contact with the appropriate instructor to discuss on-site consultations or a special request training program.

CONFIRMATION OF ENROLLMENT

Each scheduled Personnel Specialist and the agency Training Coordinator will receive an electronic mail confirmation letter approximately 30 days prior to the class date. This letter will contain important enrollment information including class dates, duration of the class, times and location.

CANCELLATION REQUIREMENTS

To cancel an enrolled Personnel Specialist, contact the Training Administrator at (916) 322-1245, via e-mail to jcollins@sco.ca.gov, or the California Relay Service at 1-800-735-2929 (TTY) no later than two weeks before the class. It is important that the "two weeks before" guideline be followed so that other Personnel Specialists have an opportunity to enroll in the vacated spot.

ENROLLMENT SUBSTITUTIONS

Substitutions will be accepted provided the substituting Personnel Specialist meets the prerequisites set for the program.

COURSE REQUIREMENTS

Prerequisites ensure that each Personnel Specialist succeeds in comprehending the subject matter offered in the class. Personnel Specialists who lack the required experience may have difficulty with the material and detract from the class. Therefore, if a Personnel Specialist is unable to maintain the pace of the session, the instructor may request that he/she return to his/her department.

CONSULTATIONS/SPECIAL REQUESTS

To request consultations or a special request training program, send an e-mail to the appropriate instructor listed in the course descriptions.

COURSE DESCRIPTIONS AND PREREQUISITES

Please note that our training program information is listed alphabetically by program name followed by the level (e.g., Advanced Salary Determinations class is listed as "Salary Determinations, Advanced"). For each program, the course descriptions are listed followed by the course prerequisites.

CORRECTIVE ACTIONS (2 Days)

Doris Meekins, Instructor
(916) 324-7274
E-mail: dmeekins@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

This course is a must for Personnel Specialists who need instructions in properly documenting Corrective Actions and Out-of-Sequence (O/S) PAR transactions. Personnel Specialists will be provided a step-by-step method of reconstructing Employment History (EH) for O/S transactions.

In-depth coverage of the Personnel Action Manual (PAM) Section 9 will be provided in the following areas:

- Corrects
- Voids
- Voids/Re-Enters
- Adding a Transaction O/S
- Reconstructing EH

Through the use of the PAM, and with a variety of comprehensive practical exercises and transaction situations, Personnel Specialists will be able to correctly determine the appropriate steps and procedures necessary to complete corrective action documentation.

PREREQUISITES

Must have completed the PAR Documentation course and have an additional four months of experience preparing a variety of PAR transactions.

EMPLOYMENT HISTORY OVERVIEW (1 Day)

Doris Meekins, Instructor
(916) 324-7274
E-mail: dmeekins@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

This course has been designed to provide instructions on updating and interpreting the information on the EH database. Through the use of PAM Section 10 and practical exercises, Personnel Specialists will be able to:

- Utilize the decentralized forms.
- Follow instructions for entering information onto the database.
- Identify and access the five EH inquiry categories.
- Analyze error messages and system problems and demonstrate methods to resolve each condition.

PREREQUISITES

Must have a Minimum of two months of personnel/payroll experience.

FUNDAMENTALS OF PAYROLL (3 Days)

Sally Durante, Instructor
(916) 322-1121
E-Mail: sdurante@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

This course provides information necessary to correctly and confidently document basic payroll transactions in today's personnel office. The class outlines appropriate procedures, processes and regulations governing a variety of payroll functions. These include completion of forms: STD. 672, Time and Attendance, for both negative and positive attendance employees; STD. 603, Report of Absences without Pay; STD. 666, Report of Exceptions to the Payroll; STD. 674, Payroll Adjustment Notice; STD. 671, Miscellaneous Payroll/Leave Actions; STD. 966, Employee Time Certification; STD. 683, Pay Adjustment Request; and CD38, Payroll Warrant Register. Personnel Specialists will learn how to reconcile Master Payroll, use the Master Payroll Certification (MPC) system, and read suspended payments and suspended transaction listings. They will also receive a general overview of the account receivable process. This course emphasizes important cutoff dates and the consequences when transactions are not processed on or before those dates. Personnel Specialists learn and acquire processing skills through a variety of practical exercises and group problem-solving activities.

PREREQUISITES

Must have a Minimum of five months of personnel/payroll experience and have certified at least two Master Payrolls for negative attendance employees that included exceptions to the payroll.

FUNDAMENTALS OF PERSONNEL (3 Days)

Elizabeth Edwards, Instructor
(916) 324-7296
E-Mail: eedwards@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

This course is designed for Personnel Specialists new to the personnel field. Personnel Specialists will learn how to process EH appointments and separations. They will also learn to ascertain the difference between permissive and mandatory actions on personnel issues and to compute state service, anniversary dates and probationary periods. The program provides information on terminology, control agency information and reference materials used in personnel. The information in this course is essential for accurately completing specific items while documenting PAR transactions.

PREREQUISITE:

Must have one month of personnel/payroll experience.

GARNISHMENT DOCUMENTATION (1 Day)

Blanca Hoffmann, Instructor
(916) 324-7261
E-Mail: bhoffmann@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

This course provides instruction on appropriate documentation methods used to correctly process all types of garnishments. This includes legal requirements placed on departments by the courts, Internal Revenue Service and the Franchise Tax Board. Earnings withholding orders for support, arrearages, federal and state tax levies, student loan defaults, and on-going support garnishments are explained. This class reviews the redeposit of support garnishment warrants, multiple garnishments and bankruptcies. Personnel Specialists learn the essential elements for Garnishment Documentation through practical exercises, examples and by using the Payroll Procedures Manual (PPM).

PREREQUISITES

Responsible for completing garnishment documentation and must have five months personnel/payroll documentation experience, and at least three months experience processing garnishments.

NON-INDUSTRIAL DISABILITY INSURANCE (NDI) PROGRAM (2 Days)

Blanca Hoffmann, Instructor
(916) 324-7216
E-Mail: bhoffmann@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

This course provides a complete overview of the NDI benefit program including laws, rules, regulations, policies and procedures. The Employment Development Department (EDD) claim process, collective bargaining considerations and personnel/payroll documentation requirements are also covered. The course examines the different NDI benefits and calculation methods used for computing regular NDI benefits and annual leave benefits. Worksheets are provided to assist in annual leave NDI computations. Practical exercises include PARs; form STD. 674D, Industrial/Non-Industrial Disability Pay/Adjustment Request; form STD. 671, Miscellaneous Payroll/Leave Request; EDD claim forms and annual leave calculations.

PREREQUISITES

Responsible for completing NDI transactions, has a minimum of four months personnel/payroll experience, and has successfully completed the PAR Documentation course or has had the responsibility for documenting PAR transactions for at least four months.

PAR DOCUMENTATION (2 Days)

Doris Meekins, Instructor
(916) 324-7274
E-mail: dmeekins@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

For those new to the personnel field, the course provides an introduction to the PAM. The primary emphasis is on the organization and use of the PAM. Personnel Specialists are provided a complete review of the PAM, completion of the six EH documents, PAR Item definitions and the selection and use of the appropriate transactions charts. Practical exercises enable Personnel Specialists to become familiar with the PAM and completion of personnel documentation.

PREREQUISITES

Responsible for documenting PAR transactions and have a minimum of two months experience documenting PARs.

PLEASE NOTE: This class is a mandatory prerequisite for the Corrective Actions course.

PAYROLL INPUT PROCESS (PIP) (1 Day)

Debra Mason Robson, Instructor
(916) 324-7256
E-Mail: dmason@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

Payroll Input Process (PIP) is a class designed for new Personnel Specialists who are processing pay transactions; e.g., overtime, positive pay and miscellaneous payments. Personnel Specialists will be provided a program overview of the PIP application and keying experience for the five PIP screens: TA - Time and Attendance; MIS - Miscellaneous/Leave Actions; DCK - Dock; ETC - Employee Time Certification; and ADJ - Pay Adjustment Request. Instructions for the available commands and Inquiry screens will be reviewed.

PREREQUISITES

Must have a minimum of two months at the Personnel Specialist level and at least two key entry experiences on the PIP system.

SALARY DETERMINATIONS, ADVANCED (2 Days)

Elizabeth Edwards, Instructor
(916) 324-7296
E-Mail: eedwards@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

This course is designed for Personnel Specialists who frequently use the salary rules and regulations. It provides practical experience in determining the correct salary rate in a variety of deep class movements. Emphasis is placed on discretionary movements between deep classes, the Personnel Management Policy/Procedures Manual Section 315 and consecutive transfers. Laws, rules, DPA and SPB memoranda regarding deep class movement are discussed.

PREREQUISITES:

Must have completed the Introduction to Salary Determinations course and have active involvement on a regular basis in the completion of salary determinations.

SALARY DETERMINATIONS, INTRODUCTION TO (2 Days)

Elizabeth Edwards, Instructor
(916) 324-7296
E-Mail: eedwards@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

Supervisors/Training Coordinators, PLEASE NOTE:

While this class is an introductory class, it is not for Personnel Specialists new to the personnel transactions field. It is designed for Personnel Specialists with a working knowledge of personnel transactions. Prior to enrolling staff, please refer to course prerequisites (shown below) for the minimum number of required months of Personnel Specialist experience.

This course provides the essential steps to correctly compute salary rates on new appointments, promotions, transfers and demotions. The primary focus is on the laws and rules pertaining to salaries and anniversaries, as well as the formulas used to determine the appropriate salary rule. Additionally, Personnel Specialists learn to apply information contained in the Civil Service Pay Scales and the rules and policies which are used to determine accurate salary rates and anniversary dates. Personnel Specialists will gain a working knowledge of methods used to determine salary rates and anniversary dates with the use of practical exercises for new appointments, movement between alternate ranges and movement between non-deep classifications.

PREREQUISITES:

Must have six months of personnel transactions experience and have completed the Fundamentals of Personnel course or have ten months of personnel transactions experience and be able to accurately determine qualifying pay periods for all time bases, and for accelerated and standard anniversary dates.

PLEASE NOTE: This course is a mandatory prerequisite for the Advanced Salary Determinations course.

WORKERS' COMPENSATION: THE BEGINNING STEPS (1 Day)

Blanca Hoffmann, Instructor

(916) 324-7261

E-mail: bhoffmann@sco.ca.gov or the

California Relay Service at 1-800-735-2929 (TTY)

This course provides valuable information to Personnel Specialists directly responsible for providing Workers' Compensation guidance to line-supervisors, managers, and/or employees. In-depth discussions include explaining Workers' Compensation benefits, eligibility requirements and the initial forms to be completed for injured employees. State Compensation Insurance Fund's (SCIF) role and responsibilities and the completion of various SCIF forms and form STD. 618S, Employee Benefit Options, are included. Personnel Specialists will learn each area of responsibility for the injured employee, the line-supervisor and the personnel office.

PREREQUISITE

Must have a minimum of four months of personnel/payroll documentation experience.

PLEASE NOTE: This class is a mandatory prerequisite for the Workers' Compensation Documentation course.

WORKERS' COMPENSATION DOCUMENTATION (3 Days)

Blanca Hoffmann, Instructor

(916) 324-7261

E-mail: bhoffmann@sco.ca.gov or the

California Relay Service at 1-800-735-2929 (TTY)

This course provides current information regarding Industrial Disability Leave (IDL) including Enhanced IDL, IDL with Supplementation and Temporary Disability (TD). Personnel Specialists learn to use a variety of reference materials to become familiar with the laws and rules governing Workers' Compensation. They research, discuss and apply regulations through networking, group problem-solving and independent study. Practical exercises include how to document personnel/payroll records for several disability cases. Added course features are written instructions and samples for abatements and SCIF payments calculated on the wage loss concept. Personnel Specialists will receive the most up-to-date information in the area of Worker's Compensation.

PREREQUISITES

Must have completed the PAR Documentation course or have six months of personnel/payroll experience documenting PAR transactions. Must have completed the Workers' Compensation: The Beginning Steps course. The Personnel Specialist should be responsible for completing Workers' Compensation transactions.

Should you have questions regarding this letter, please contact Ron Hutcheson at (916) 445-6983, or via e-mail at rhutcheson@sco.ca.gov.

JRH:jbc